

UNIT 16 DOCUMENTING THE SOURCE SELECTION PLAN

September 2002

(FAC 2001-09)

Duty	Determine whether a written plan source selection plan is necessary or desirable.
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Conditions	Given forecast requirements, written or unwritten acquisition plan, market research, Procurement Request, other related documents, and related decisions (e.g., identified price-related factors and non-price-related factors for offer evaluation).
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Overall Standard	Properly document source selection planning as required by agency procedures and good business practice. Plans are particularly important for complex procurements that will take extended periods of time to complete.

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Policies

<i>FAR</i>	<i>Agency Suppl.</i>	<i>Subject</i>
7.105(b)		Acquisition plan requirement for plan of action

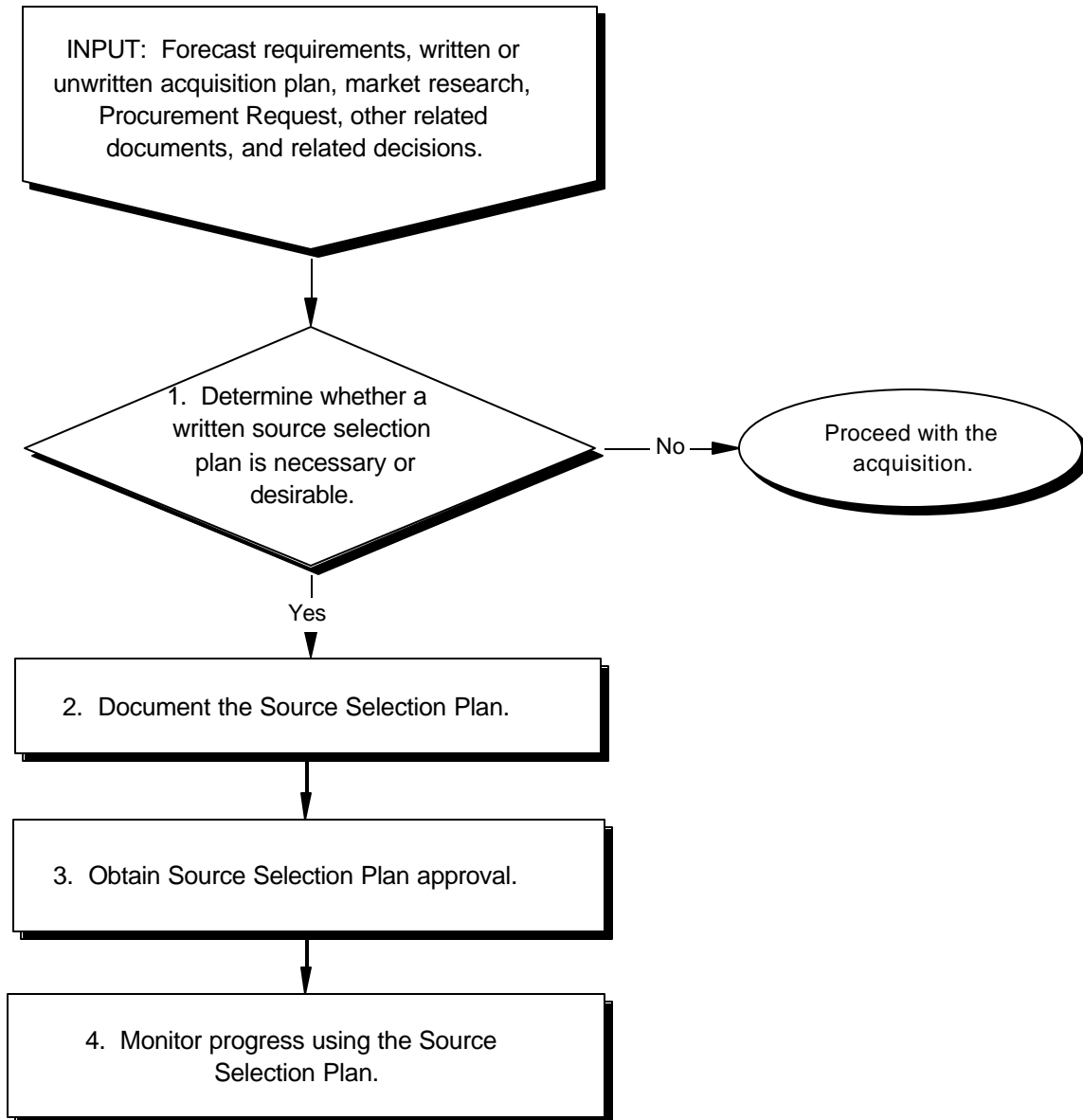
Other KSA's

1. Knowledge of the nature and purpose of planning, planning premises, decision-making, planning techniques (e.g., networking planning generally, PERT/CPM, and probabilistic network methods), and steps in planning a project.
2. Knowledge of the relationship between line and staff authority (in terms of identifying roles, responsibilities, and milestones for a procurement plan).
3. Knowledge of the role of service functions (e.g., contracting) in supporting line managers on mission accomplishment.
4. Ability to communicate effectively and exercise leadership in working with line managers.
5. Ability to apply sound business judgment to the acquisition process.
6. Ability to maintain the honesty and integrity of the acquisition process.
7. Ability to prepare clear detailed written documents.
8. Ability to plan effectively.
9. Ability to work with teams of various sizes.
10. Ability to make appropriate business decisions to facilitate the acquisition process.

Other Policies and References (Annotate As Necessary):

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Tasks	Related Standards
1. Determine whether a written source selection plan is necessary or desirable.	<p>Consider good business practice and agency requirements for a Source Selection Plan or an update of the Acquisition Plan to document source selection planning. A written plan is:</p> <ul style="list-style-type: none"> • Particularly important for a complex negotiated acquisition that will take an extended period to complete. • Normally not required for a simplified, sealed bid, or other smaller dollar acquisition.
2. Document the Source Selection Plan.	<p>Either in a separate Source Selection Plan or in the Acquisition Plan, document planning for key elements of the source selection, such as:</p> <ul style="list-style-type: none"> • Acquisition strategy, including the requirement, expected competition, and method or procurement. • Source selection organization, including the recommended members identified by name, position title, or functional area. • Presolicitation activities, including market research and synopsis. • Evaluation procedures, including whether award will be made based on the identified low-priced technically acceptable offer or a trade-off evaluation. • Evaluation factors and their relative importance, including: <ul style="list-style-type: none"> - Price or cost; - Technical; - Management; and - Past performance. • Schedule of events, including key events and the projected dates for completion. Key events should include such activities as: <ul style="list-style-type: none"> - Issuing the solicitation; - Receiving offers; - Completing offer evaluation; - Source Selection Authority (SSA) decision; - Contract preparation and signature; - Contract approval; and - Contract award.

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Tasks	Related Standards
3. Obtain Source Selection Plan approval.	Obtain any necessary approval(s) of the plan. In most cases, SSA approval is required. Additional approval(s) may be required by the SSA or agency regulations.
4. Monitor progress using the Source Selection Plan.	As key decisions are made, record them in the plan. Monitor progress to identify the need to modify the plan to meet requirement need dates.